

UNIT 28 PREQUOTE/PREBID/PREPROPOSAL CONFERENCES

(Formerly Unit 27)

UNIT CERTIFICATION

Statement of Completion

_____ has satisfactorily completed on-the-job training in the duty or duties of this Unit under the conditions described below and in accordance with the overall standard(s) for this Unit.

- | | |
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| Duties | <ol style="list-style-type: none">1. Determine the need for conducting a prequote/prebid/preproposal conference.2. Prepare for and conduct the prequote prebid/preproposal conference. |
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| Conditions | Given a purchase request, market data, the synopsis (if any), and a solicitation |
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| Overall Standard(s) | Call for a conference when contractors do not appear to have a reliable or valid understanding of the solicitation's requirements. Furnish all prospective offerors with identical information concerning the proposed acquisition. Do not use the conference as a substitute for amending a defective or ambiguous specification or solicitation. |
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Evaluator

Name

Title

Date

| DOCUMENTATION OF OJT ASSIGNMENT(S) | |
|------------------------------------|--|
| Description of Assignment: | |
| Evaluation: | |
| Completion Date: | |

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Policies

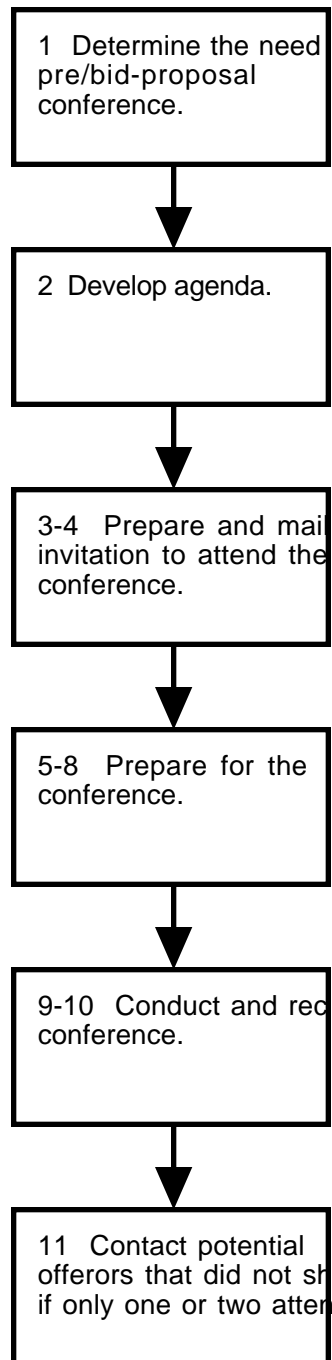
| <i>FAR</i> | <i>Agency Suppl.</i> | <i>Subject</i> |
|------------|--------------------------|--|
| 14.207 | | Pre-bid conferences. |
| 15.409 | | Pre-proposal conferences. |
| 37.110(a) | | Site visits in solicitations for services (other than construction) to be performed on Government installations. |
| 52.237-1 | | Site visits for other than construction. |
| 52.247-4 | | Inspection of Government shipping and receiving facilities. |

Other KSA's

Reserved.

Other Policies and References (Annotate As Necessary):

PREBID/PREPROPOSAL CONFERENCES



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Tasks

Related Standards

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| <p>1. Determine the need for a pre/quote-bid-proposal conference.</p> <p>Consider a conference:</p> <ul style="list-style-type: none"> • To explain a complex requirement and/or technical evaluation factors. • When contractors need to physically inspect work sites or property to be furnished by the Government. • When revising a longstanding requirement. • When there has been a long period of time between awards. • When contractor inquiries suggesting that key terms and conditions are vague, ambiguous, or unattractive to industry. | <p>1. Call for a conference when:</p> <ul style="list-style-type: none"> • Contractors do not appear to have a reliable or valid understanding of the contract's requirements, and • Significant dollars are at risk. |
| <p>2. Develop agenda</p> <ul style="list-style-type: none"> • Briefing on solicitation. • Presentation of prepared responses to questions submitted in advance. • Questions and answers from the floor. | |
| <p>3. Prepare invitation to attend the conference:</p> <ul style="list-style-type: none"> • Nature and scope (reference solicitation at issue). • Attach copy of agenda. • Solicit questions in writing. • Notice of time and place. | |
| <p>4. Mail invitation to all prospective offerors who have received copies of the solicitation.</p> | <p>4. Mail the invitation only when notice of the conference was not included in the synopsis.</p> |
| <p>5. Refer submitted technical questions to technical personnel for comment.</p> | |
| <p>6. Prepare consolidated responses to questions on business terms and conditions and, based on comments from technical personnel, the requirements.</p> | <p>6. Perform all necessary research to fully answer any question.</p> |

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| Tasks | Related Standards |
|---|---|
| <p>7. Prepare opening briefing.</p> <ul style="list-style-type: none"> • Background and other facts not covered in the solicitation • Description of the requirement, selection criteria, and method of award. • Special terms and conditions not ordinarily included. • If the method of procurement has changed since the previous contract, describe the process • Government's positions on potentially controversial issues (e.g., why not set aside for small business). • Invitation to ask questions or express concerns with the solicitation. | <p>7. Make no statement that conflicts with the solicitation. Advise attendees that (1) remarks and explanations at the conference shall not qualify the terms of the solicitation and (2) terms of the solicitation and specifications remain unchanged unless the solicitation is amended in writing.</p> |
| <p>8. Brief technical personnel.</p> <ul style="list-style-type: none"> • Roles. • Agenda. • Limits on providing information to attendees. | |
| <p>9. Conduct the conference.</p> | <p>Keep a complete record of the conference proceedings including questions and answers. Provide answers for all questions. Provide a copy of the record to all prospective offerors.</p> |
| <p>10. Contact potential offerors that did not show, if only one or two attend.</p> | |